Thinking about legacy, how important are the following financial priorities to you? -

Total	Retired (retired + semi- retired)	All others
	F	G
1250	377	873
1250	371	879
874	260	614
70%	70%	70%
369	116	252
29%	31%	29%
505	143	361
40%	39%	41%
376	112	265
30%	30%	30%
235	56	178
19%	15%	20%
142	55	86
11%	15%	10%
1250	371	879
100%	100%	100%
	1250 1250 874 70% 369 29% 505 40% 376 30% 235 19% 142 11%	F 1250 377 1250 371 371 374 260 70% 70% 369 116 29% 31% 376 112 30% 30% 235 56 19% 15% 142 55 11% 15% G 1250 371 3

Thinking about legacy, how important are the following financial priorities to you? - Ensuring my estate is taxed as little as possible so my family receives a larger inheritance

inheritance			
		Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	954	290	664
Top 2 Box (Net)	76%	78%	76%
	464	175	289
Very important	37%	47% G	33%
	489	115	374
Somewhat important	39%	31%	43% F
	296	81	215
Bottom 2 Box (Net)	24%	22%	24%
	188	46	142
Not very important	15%	12%	16%
	109	36	73
Not at all important	9%	10%	8%
	1250	371	879
Sigma	100%	100%	100%

Thinking about legacy, how important are the following financial priorities to you? Ensuring my family receives money quickly so they aren't paying out-of-pocket for
my funeral and other end-of-life expenses

my funeral and other end-of-life expens	ses	ĺ	
	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	1025	305	720
Top 2 Box (Net)	82%	82%	82%
Top 2 Box (Net)	82%	82%	82%
	516	170	346
Very important	41%	46%	39%
	509	135	374
Somewhat important	41%	36%	43%
	225	66	159
Bottom 2 Box (Net)	18%	18%	18%
	133	32	101
Not very important	11%	9%	11%
	91	34	58
Not at all important	7%	9%	7%
	1250	371	879
Sigma	100%	100%	100%
		1	

How knowledgeable are you about the following insurance policies? - Term Life Insurance

Insurance			
	Total	Retired	All others
		(retired +	7 0
		semi-	
		retired)	
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	625	176	449
Top 2 Box (Net)	50%	47%	51%
	457	44	447
Martin accidental	157	41	117
Very knowledgeable	13%	11%	13%
	468	135	333
Somewhat Knowledgeable	37%	36%	38%
	625	196	429
Bottom 2 Box (Net)	50%	53%	49%
	407	128	279
Not very knowledgeable	33%	35%	32%
	218	67	151
Not at all knowledgeable	17%	18%	17%
	1250	371	879
Sigma	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Universal Life Insurance

	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	497	106	391
Top 2 Box (Net)	40%	29%	45%
			F
	111	26	85
Very knowledgeable	9%	7%	10%
	386	80	306
Somewhat Knowledgeable	31%	21%	35%
Somewhat knowledgeable	31%	21%	35% F
	753	265	487
Bottom 2 Box (Net)	60%	71%	55%
DOCUM 2 BOX (NEL)	00%	71% G	33/0
	460	160	300
Not very knowledgeable	37%	43%	34%
,on.eugeau.e	3,70	G	3470
	293	106	188
Not at all knowledgeable	23%	28%	21%
, and the second		G	
	1250	371	879
Sigma	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Whole Life Insurance

Insurance			
	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	625	172	453
Top 2 Box (Net)	50%	46%	52%
	139	40	99
Very knowledgeable	11%	11%	11%
	485	131	354
Somewhat Knowledgeable	39%	35%	40%
	625	200	425
Bottom 2 Box (Net)	50%	54%	48%
	396	124	272
Not very knowledgeable	32%	33%	31%
	229	75	153
Not at all knowledgeable	18%	20%	17%
	1250	371	879
Sigma	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Segregated

Total (retired + semi-retired) Retired (retired + semi-retired) F G G G G G G G G	Funds			
Semiretired F G		Total		All others
Base: All Respondents (unwtd) 1250 377 873				
Base: All Respondents (wtd) 1250 371 879			F	G
Top 2 Box (Net) 283 53 230 23% 14% 26% F 79 18 61 6% 5% 7% 204 35 169 Somewhat Knowledgeable 16% 10% 19% F 967 318 649 86% 74% G 479 141 338 Not very knowledgeable 38% 38% 38% Not very knowledgeable 488 177 311 Not at all knowledgeable 488 35% G 1250 371 879	Base: All Respondents (unwtd)	1250	377	873
Top 2 Box (Net) 23% 14% 26% F 79 18 61 79 18 61 6% 5% 7% 204 35 169 204 35 169 F 204 35 169 F 967 318 649 Bottom 2 Box (Net) 77% 86% 74% G 479 141 338 Not very knowledgeable 38% 38% 38% 488 177 311 Not at all knowledgeable 488 177 311 Not at all knowledgeable 39% 48% 35% G 1250 371 879	Base: All Respondents (wtd)	1250	371	879
F 79 18 61 6% 5% 7%		283	53	230
T9	Top 2 Box (Net)	23%	14%	26%
Very knowledgeable 6% 5% 7% 204 35 169 204 35 169 16% 10% 19% F 967 318 649 967 318 649 77% 86% 74% G 479 141 338 Not very knowledgeable 38% 38% 38% Not at all knowledgeable 488 177 311 Not at all knowledgeable 39% 48% 35% G 1250 371 879				F
204 35 169 16% 10% 19%		79	18	61
Somewhat Knowledgeable	Very knowledgeable	6%	5%	7%
Somewhat Knowledgeable				
F 967 318 649	Company to the control of the contro			
Bottom 2 Box (Net) 967 318 649 77% 86% 74% G 479 141 338 Not very knowledgeable 38% 38% 38% 488 177 311 Not at all knowledgeable 39% 48% 35% G 1250 371 879	Somewhat knowledgeable	16%	10%	
Bottom 2 Box (Net) 77% 86% 74% G G 479 141 338 Not very knowledgeable 38% 38% 38% Not at all knowledgeable 488 177 311 Not at all knowledgeable 39% 48% 35% G 1250 371 879		967	318	
G 479 141 338 38%	Bottom 2 Box (Net)			
Not very knowledgeable 38% 38% 38% 38% 38% 38% 38% 38% 38% 38%				
Not at all knowledgeable 488 177 311 Not at all knowledgeable 39% 48% 35% G 1250 371 879		479	_	338
Not at all knowledgeable 39% 48% 35% G 1250 371 879	Not very knowledgeable	38%	38%	38%
Not at all knowledgeable 39% 48% 35% G 1250 371 879				
G 1250 371 879		488	177	311
1250 371 879	Not at all knowledgeable	39%	48%	35%
Sigma 100% 100% 100%				
	Sigma	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Payout Annuities

Annuities			
	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	392	106	286
Top 2 Box (Net)	31%	29%	33%
	80	20	61
Very knowledgeable	6%	5%	7%
	312	87	226
Somewhat Knowledgeable	25%	23%	26%
	858	265	593
Bottom 2 Box (Net)	69%	71%	67%
	487	146	341
Not very knowledgeable	39%	39%	39%
	371	118	252
Not at all knowledgeable	30%	32%	252
_			
	1250	371	879
Sigma	100%	100%	100%

How knowledgeable are you about the following insurance policies? - Disability Insurance

Insurance			
		Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
	713	182	531
Top 2 Box (Net)	57%	49%	60%
			F
	147	40	108
Very knowledgeable	12%	11%	12%
	565	142	423
Somewhat Knowledgeable	45%	38%	48%
			F
	537	189	348
Bottom 2 Box (Net)	43%	51%	40%
		G	
	375	129	246
Not very knowledgeable	30%	35%	28%
	162	60	102
Not at all knowledgeable	13%	16%	12%
	1250	371	879
Sigma	100%	100%	100%

Please select the statements that apply to you.

Please select the statements that apply to you.			
	Total	Retired (retired + semi- retired)	All others
	4250	F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
Sase: All Respondents (May			
	563	182	381
I am the person who primarily manages finances in my	45%	49%	43%
household	43%	49%	45%
	182	23	159
I wish I had had more conversations about money and			
estate planning before someone I loved was gone	15%	6%	18%
			F
	420	166	254
I am planning to leave an inheritance	34%	45%	29%
		G	
	113	20	93
I anticipate I will receive an inheritance and depend on it financially	9%	5%	11%
Illiancially	370	370	F F
	219	112	107
I've received an inheritance	18%	30%	12%
		G	
	207	92	115
I was confident about what to do with an inheritance I received	17%	25%	13%
received	1770	G	1570
	58	8	49
I was overwhelmed by financial options for what to do with			
an inheritance I received	5%	2%	6%
			F
	182	89	93
I have an established estate plan in place	15%	24%	11%
	1370	G	11/0
	139	51	88
I anticipate outliving my spouse	11%	14%	10%
	667	208	459
I don't want to leave a financial burden for my family after	53%	56%	52%
I'm gone	3370	30/0	32/0
	164	40	125
None of the above	13%	11%	14%
	1370		
none of the above	1370		
none of the datase	2913	991	1922
Sigma		991 267%	1922 219%

Please select the statements that apply to you:			
	Total	Retired (retired + semi- retired)	All others
		F	G
Base: All Respondents (unwtd)	1250	377	873
Base: All Respondents (wtd)	1250	371	879
I have identified my financial needs for retirement, including potential healthcare costs, inflation and	254	103	151
unexpected expenses	20%	28%	17%
In retirement, I may need additional revenue streams or	274	G 59	215
supplemental income beyond my retirement savings	22%	16%	24%
			F
I am confident that I will have enough money throughout my retirement to be able to afford the lifestyle I'd like to	398	174	224
lead	32%	47%	25%
	211	G 48	163
I believe I need life insurance in retirement			
I believe i need life insurance in retirement	17%	13%	19%
I have set aside money or have life insurance to pay for final expenses, including funeral costs, managing property until it	354	141	213
is sold and settling my estate	28%	38%	24%
		G	
	366	86	281
I have consumer debt (loans, line of credit, etc.)	29%	23%	32%
	311	179	F 132
I own my home and no longer have mortgage payments			
Town my nome and no tonger nave moregage payments	25%	48% G	15%
	145	49	96
I am able to max out my RRSP contributions every year	12%	13%	11%
			,-
	218	104	114
I am able to max out my TFSA contributions every year	17%	28%	13%
	153	G 27	126
I financially support family outside of my immediate	153	27	120
household (e.g., parents, relatives)	12%	7%	14% F
	217	48	168
None of the above	17%	13%	19%
	2901	1019	F 1882
Sigma	2901	274%	214%
	232,0	2,4,0	22-7/0